Australian Government
Department of Education

A guide to submitting Commonwealth Scholarship Offers and Records

Version 1.3

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1 Overview

OBJECTIVES OF THIS PROJECT

As part of the 2007 budget initiatives for Higher Education, the Commonwealth Government introduced additional scholarship types to target the needs of specific groups of tertiary students. These new scholarship types are to be available for the academic year 2008.

Changes to Commonwealth Scholarships accessible to students are delivered through enhanced functionality implemented in the Higher Education Information Management System (HEIMS) and reported on at the student level in myUniAssist.

PURPOSE OF THIS DOCUMENT

This document provides a guide to Users of the enhanced Commonwealth Scholarship functionality developed to support these initiatives.

CONTACTS

Should you have any need to contact the department in relation to the 2008 Commonwealth Scholarship initiatives, please use the following contact points:

Indigenous Scholarships:

Email: scholarships@education.gov.au

(02) 6219 3462

General Scholarship enquiries:

Email: scholarships@education.gov.au

(02) 6219 3461

For assistance with the use of the Scholarship's system functionality please contact: heims.datacollections@education.gov.au.

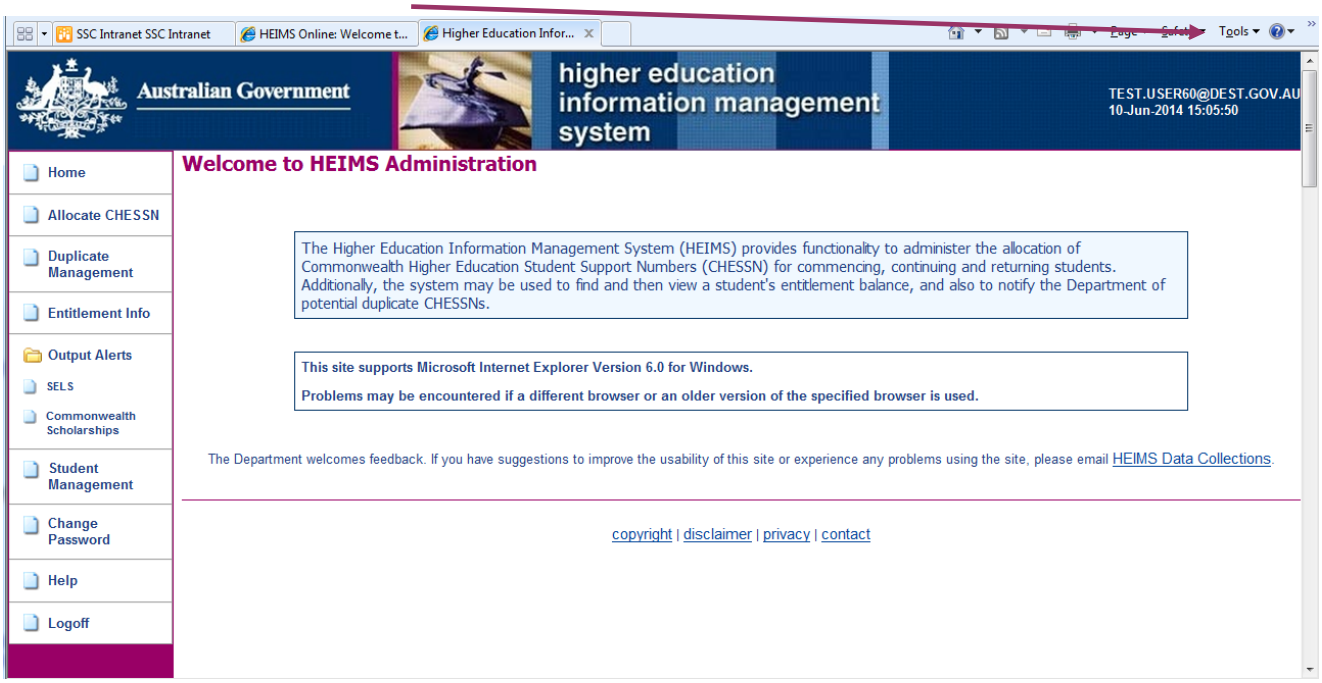
(02) 6240 7487

Web Browser Settings

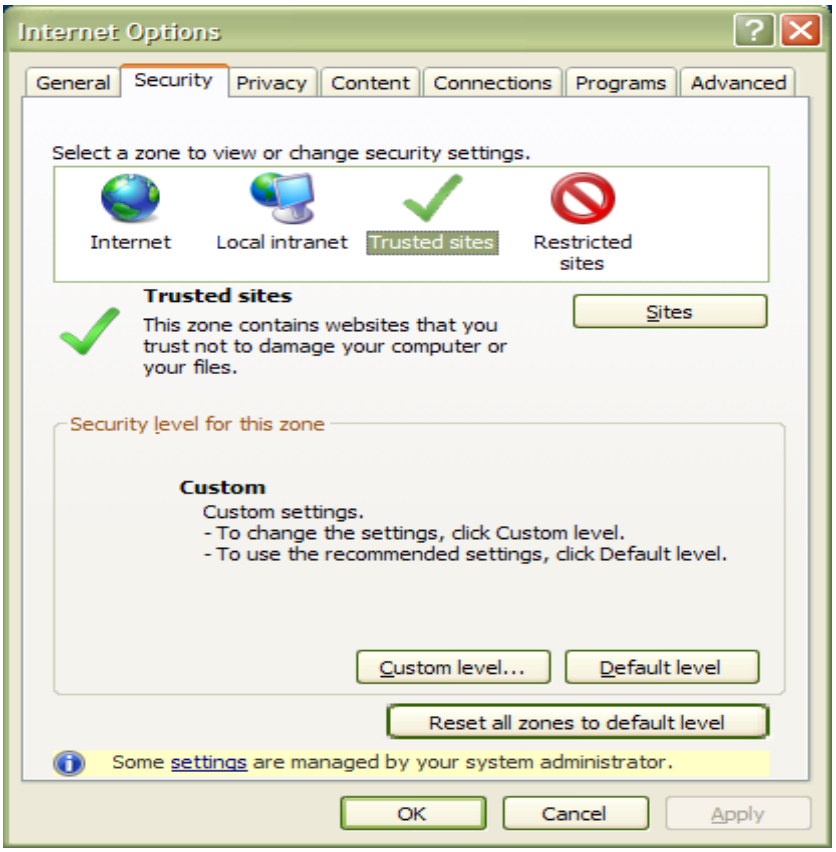
Navigate to https://admin.heims.education.gov.au/ (Production URL)

2 Web Browser Settings

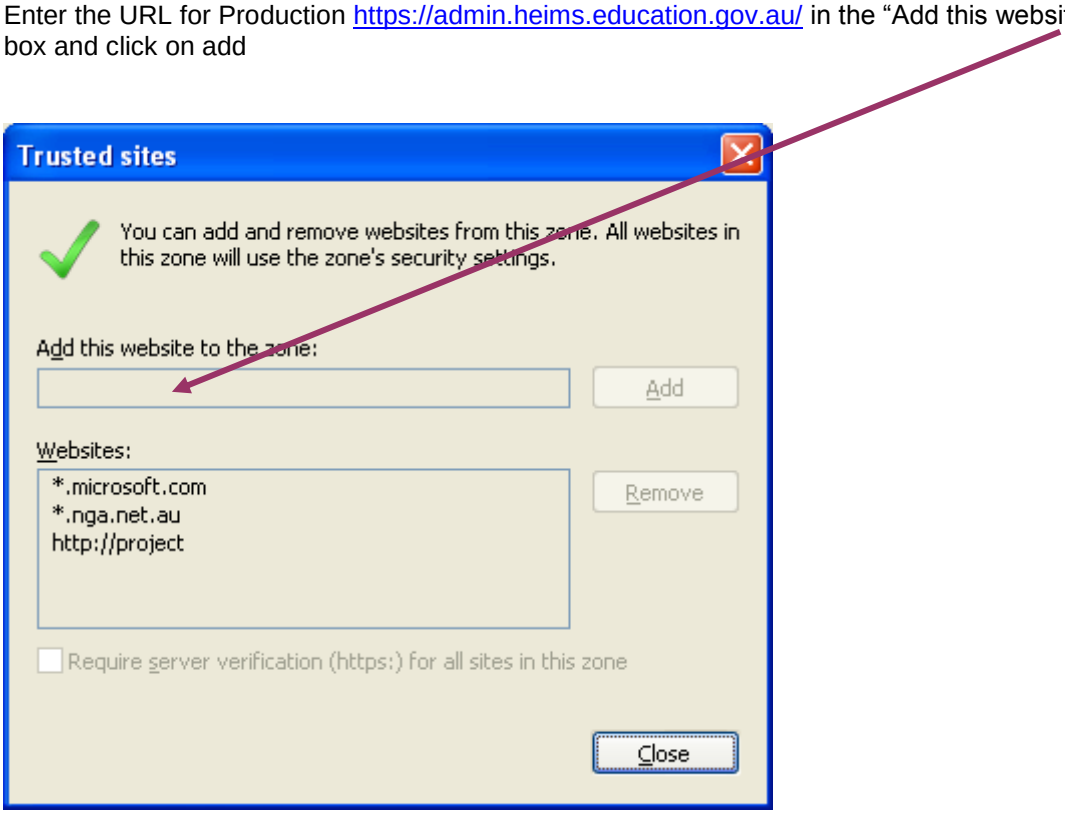
Select Tools (top right hand corner) then Internet Options menu item



1. Click the Security tab
2. Click Trusted Sites (big green tick)
3. Click the Sites button

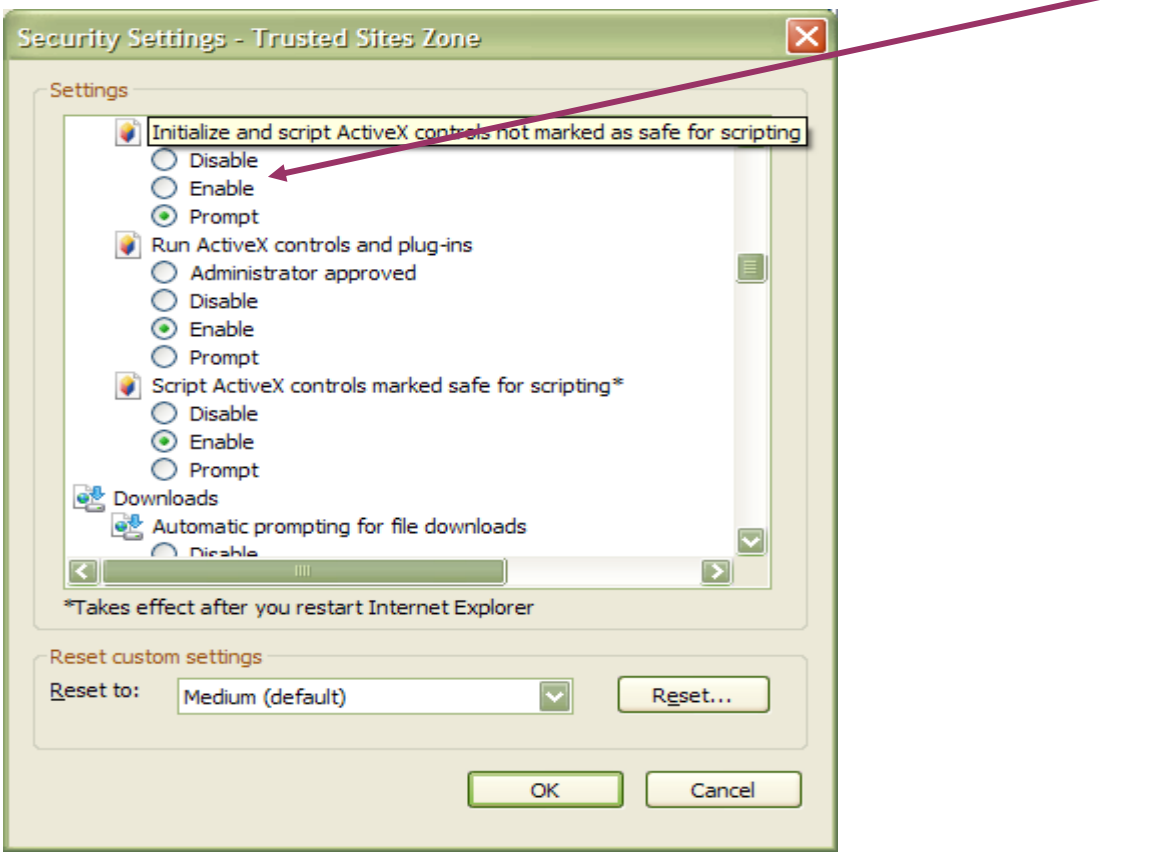


Enter the URL for Production https://admin.heims.education.gov.au/ in the “Add this website to the zone” text box and click on add



Click Close, then click "Custom level…" button

1. Scroll down to "Initialize and script ActiveX controls not marked as safe for scripting" and set to Enable. Click OK, then OK. You may need to restart IE for the change to take effect.



SCHOLARSHIP FUNCTIONS

Scholarships functionality is accessed from the main HEIMS Administration menu which provides access to run the core processes of loading data and reporting on that data once it has been loaded into the system (refer to Fig 1).

These core processes are managed through the following functions:

File Submission

This function calls a file submission screen that allows the user to browse to a directory function to select a Commonwealth Scholarship (CS) file to be loaded and submitted to the HEIMS Administration system.

Online Submission

This function allows the user to enter a new scholarship record for a student.

Submission Report Summary

This function displays a summary of results of the submitted file by showing a count of the successful, failed and ignored records and provides the ability to view individual records through an export to an Excel spreadsheet. The user has the ability to filter by Client Organisation and by Submission(s).

HEIMS View

This function allows the user to view the records processed by the department in HEIMS. It also provides the ability to export records and to modify or delete a record.

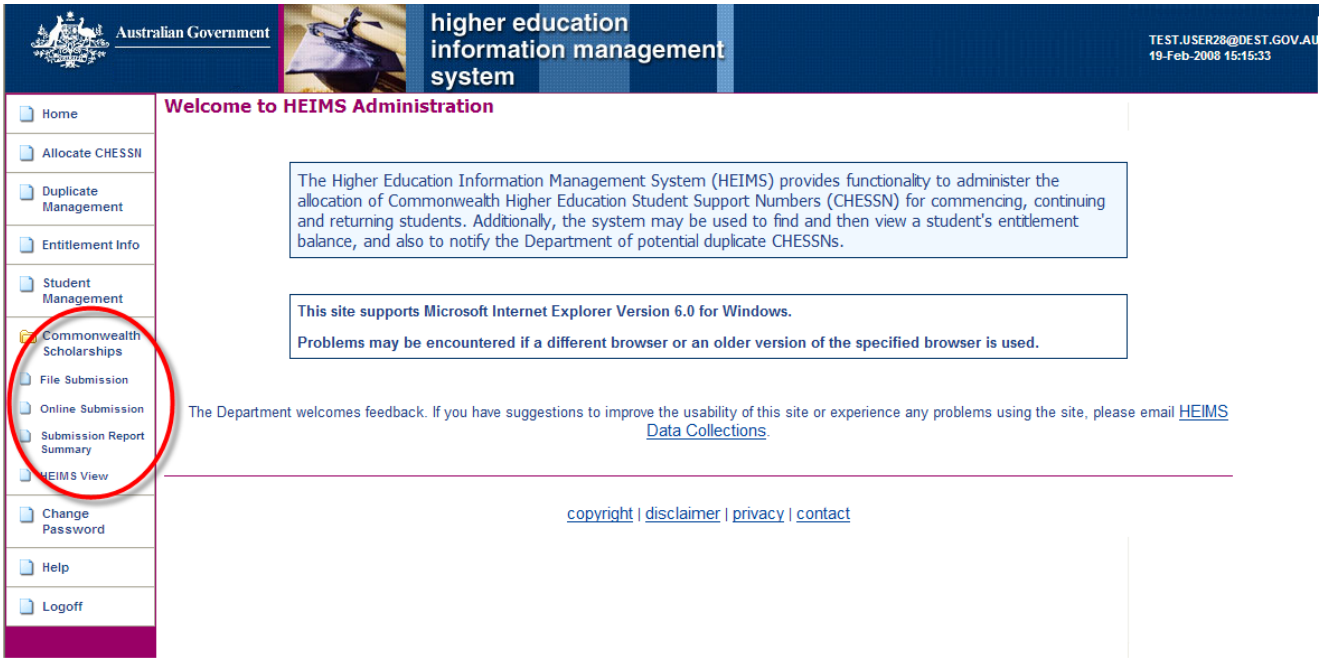


Fig 1

Note that the User must be authorised to use the HEIMS Administration system for Commonwealth Scholarships before they can gain access to this functionality.

FILE SUBMISSION (LOADING A FILE)

Locating the file to be loaded

The steps to take in loading a file are:

- Go to the Commonwealth Scholarships menu (refer Fig 1)
- Select File Submission (refer Fig 1)
- Browse and select the CS file (refer Fig 2)
- Open the file

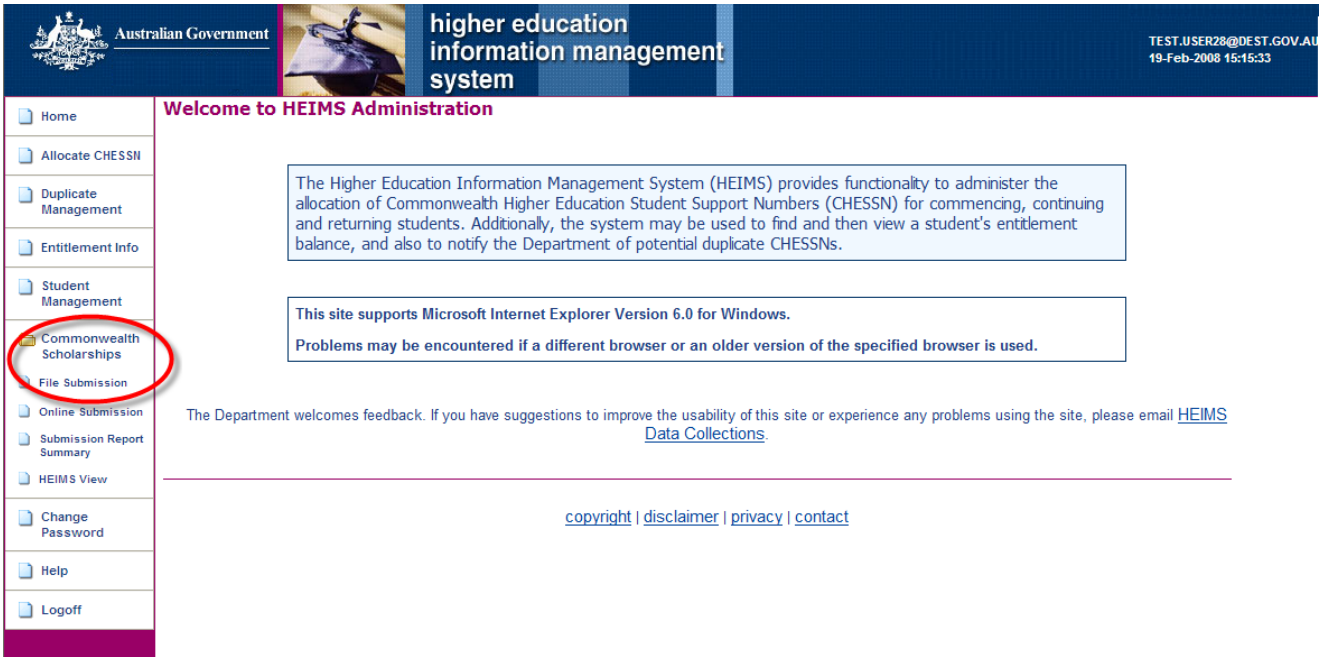


Fig 2

Select the File Submission option in the CS menu to access the File Submission screen.

To load a CS file, select the Browse button in the File Submission window. A standard Windows file selection dialog window will appear allowing the user to navigate to the relevant directory where the data file is stored (refer to Fig 3).

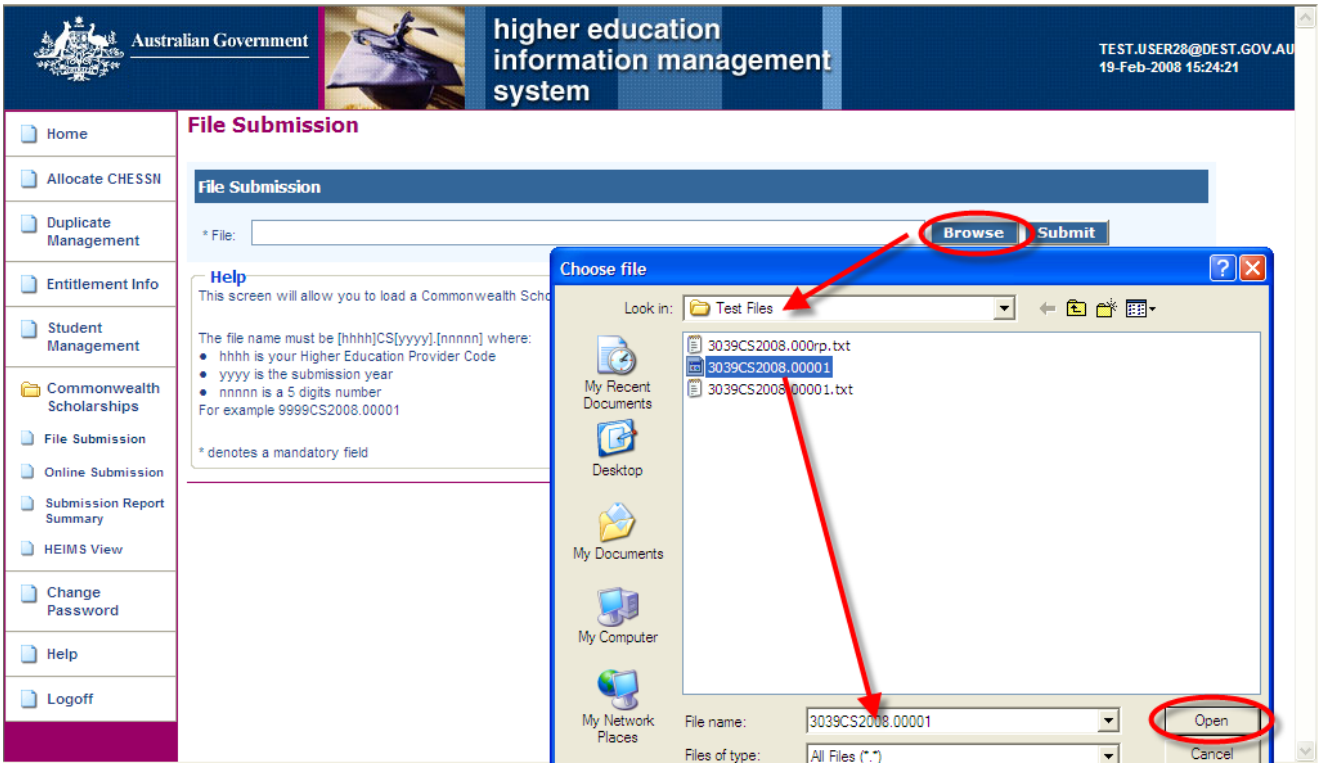
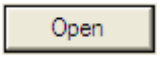


Fig 3

The default directory located by this process is the last open drive and directory location. Where this is not found the default will be to the local C:\ drive of the user's system.

Upon locating the correct directory and file and selecting the file to be loaded, the user selects the 

button. The system will generate an error at this point if the file name of the file to be submitted is not in the correctly defined format shown below:

File Naming Convention

File name will be **hhhhxxyyyy.nnnnn**, where:

- **hhhh**: HEP code
- **xx:** abbreviation of data category: CS (not case sensitive)
- **yyyy**: reporting year
- **nnnnn:** number (file number; maximum 5 digits; numeric)

For example, a CS file name would be: 9999CS2008.00001

Note: In the Directory 'Test Files' in the screen image in *Fig 3*, there are two files with incorrect file naming convention ('30392008.00001.txt' and '30392008.000rp.txt'). Both of these are in error because of the '.txt' extension and in the second case the incorrect number '.000rp'. An example of the file name error generated is displayed in *Fig 4* below.

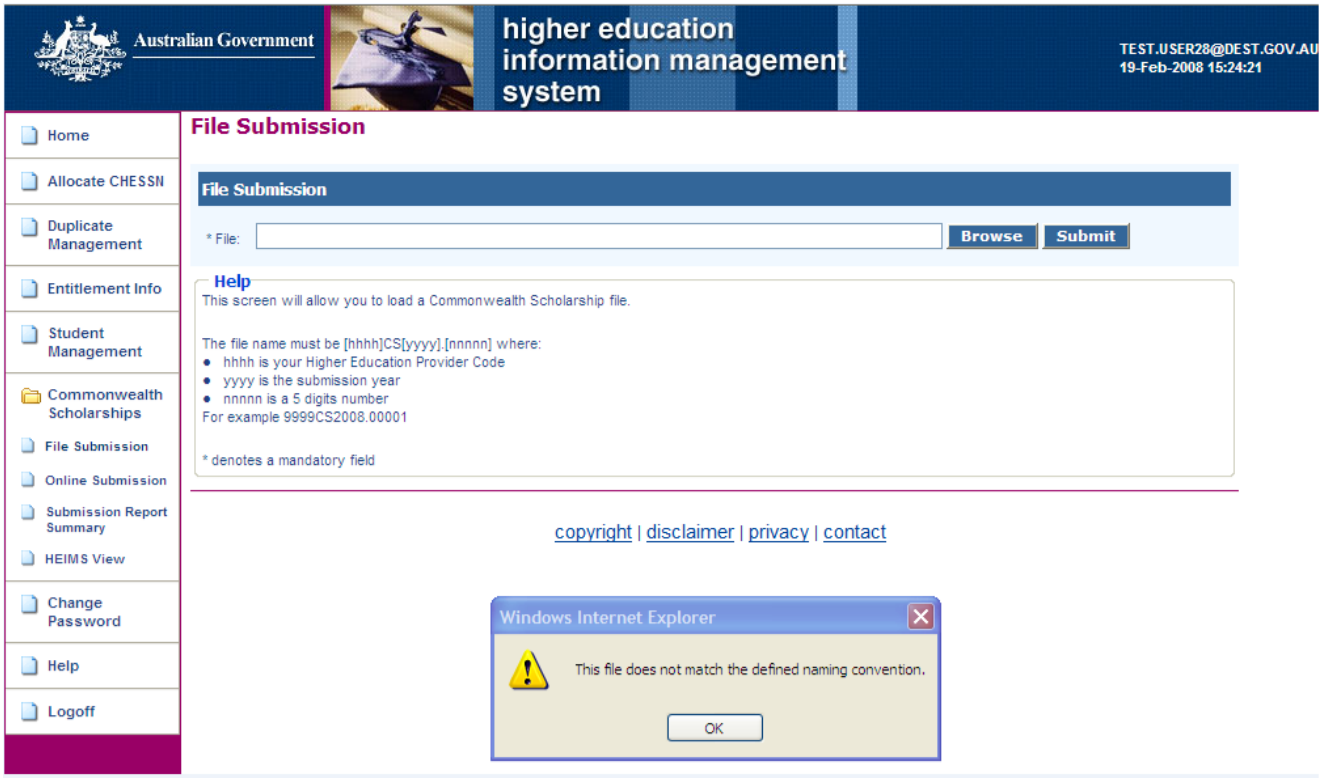


Fig 4

USING FILE SUBMISSION (LOADING A FILE) TO REPORT COMMONWEALTH SCHOLARSHIP OFFERS OR COMMONWEALTH SCHOLARSHIP RECORDS.

The steps to take in submitting a CS Offer or Record through file submission are:

- Select File Submission from left hand menu
- Locate the CS file for loading. Refer to Section 2.2 on File Submission.
- **Submit** the CS file for loading
- **Refresh** to get an updated view of submissions for the selected HEP
- **Display Results** button displays results of records processed for a selected submission

Submit the CS File

If the file name is in the correct format, the selected file will be populated in the file name submission box. The user may them submit the file using the **Submit** button. The system will process the file checking that the file length corresponds to the defined file length. An error will be returned where the CS file fails this validation (*refer to Fig 5).*

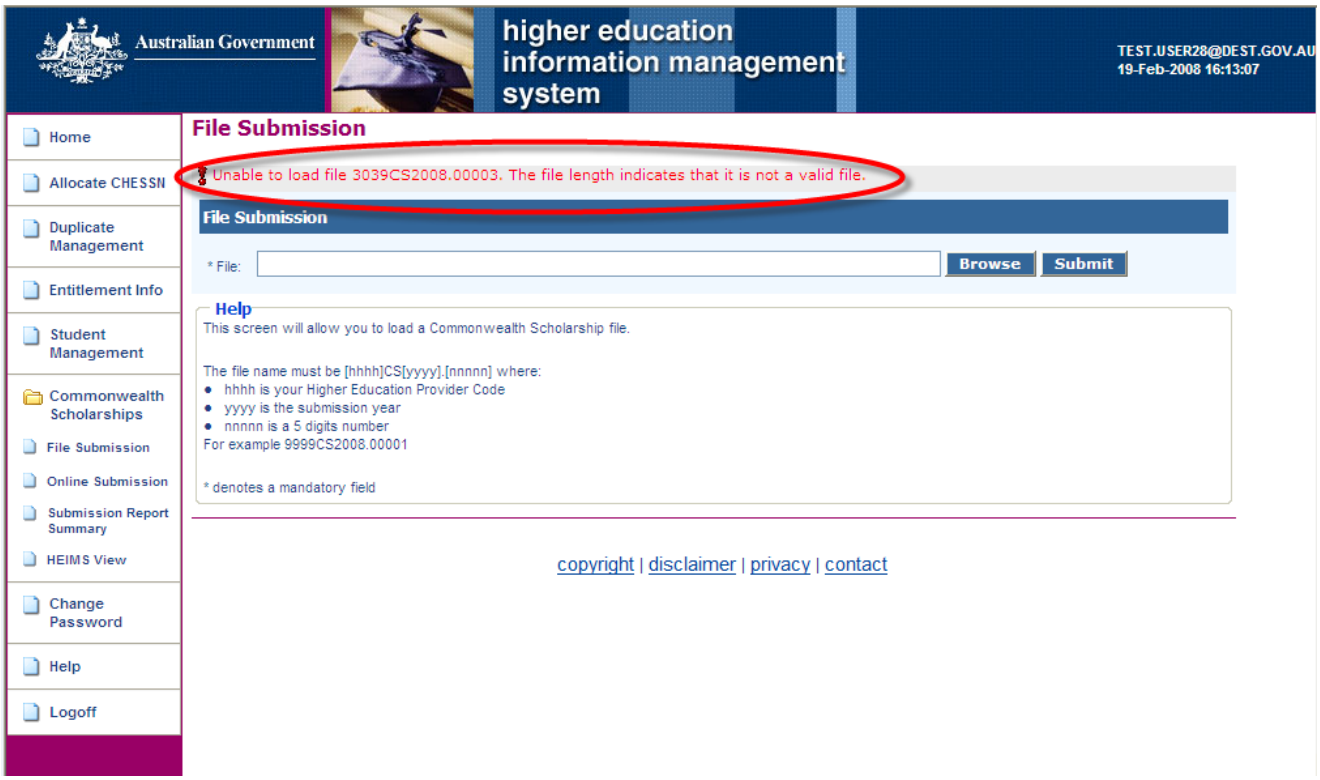


Fig 5

Submission Processing

If the file is the correct length, processing of the file will continue. The system will display a message that it is validating records (*refer Fig 6*).

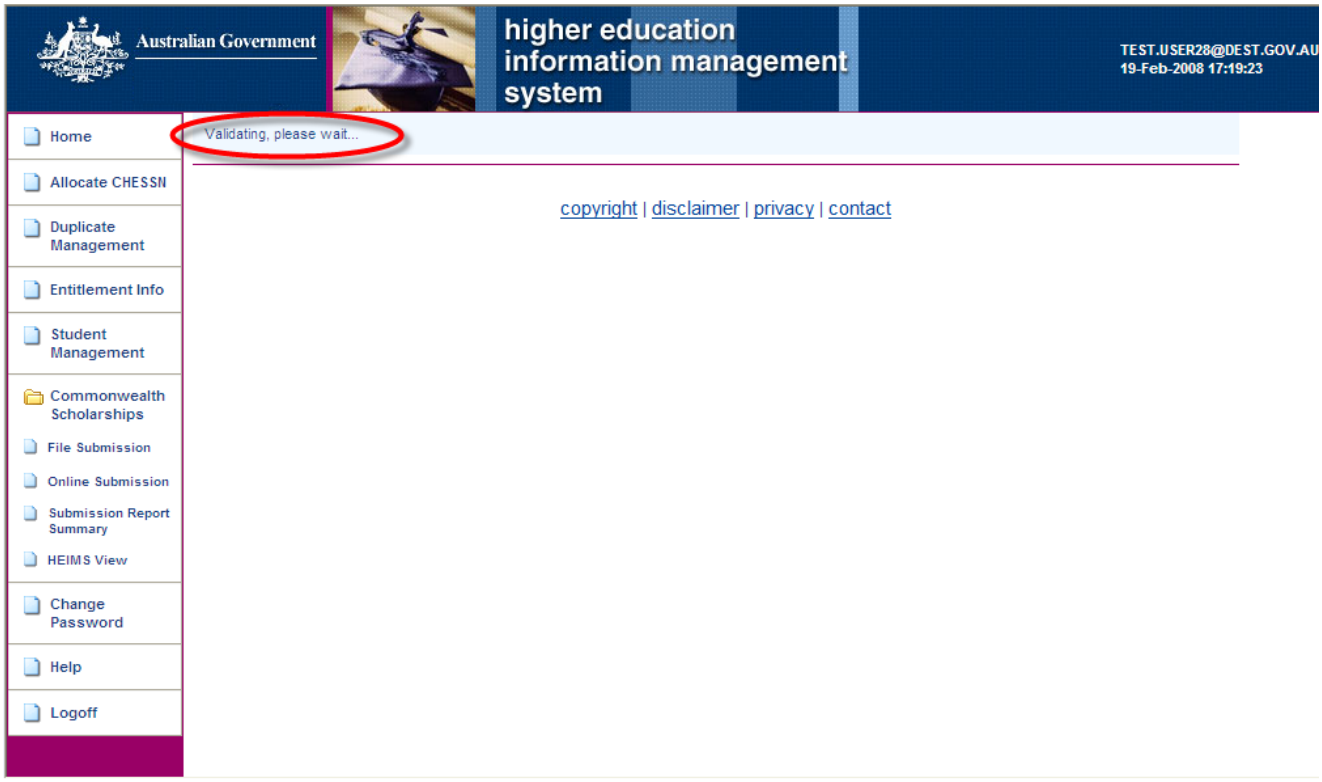


Fig 6

Where the file has a small number of records to process, it will complete that processing before displaying the results on the Submission Report Summary screen.

In the case where it is processing a larger file (approximately 100 records), the system will display the Submission Report Summary screen showing the *'in progress'* numbers for the submission being loaded in the Select Submission(s) window section of the report against the Client Organisation field. It will also display any submissions previously loaded for that Higher Education Provider (HEP) (*refer Fig 7*).

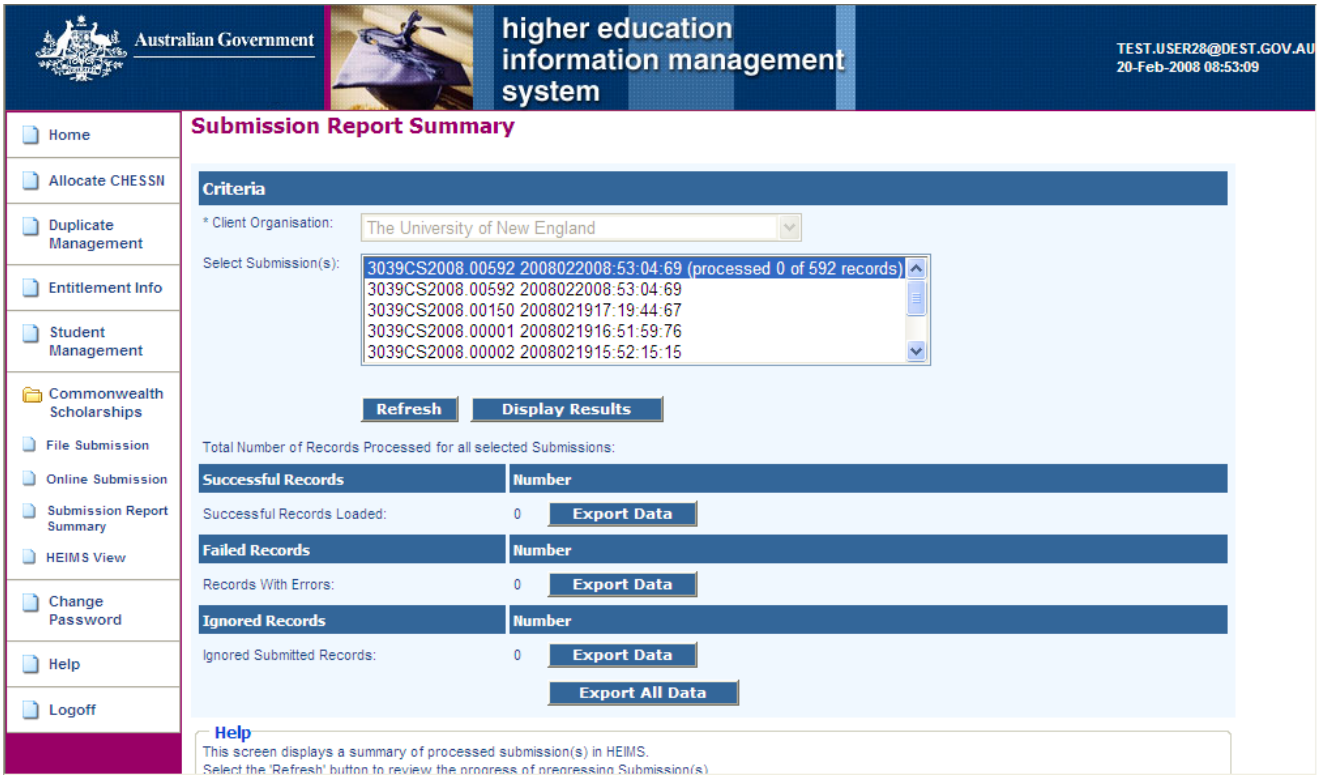


Fig 7

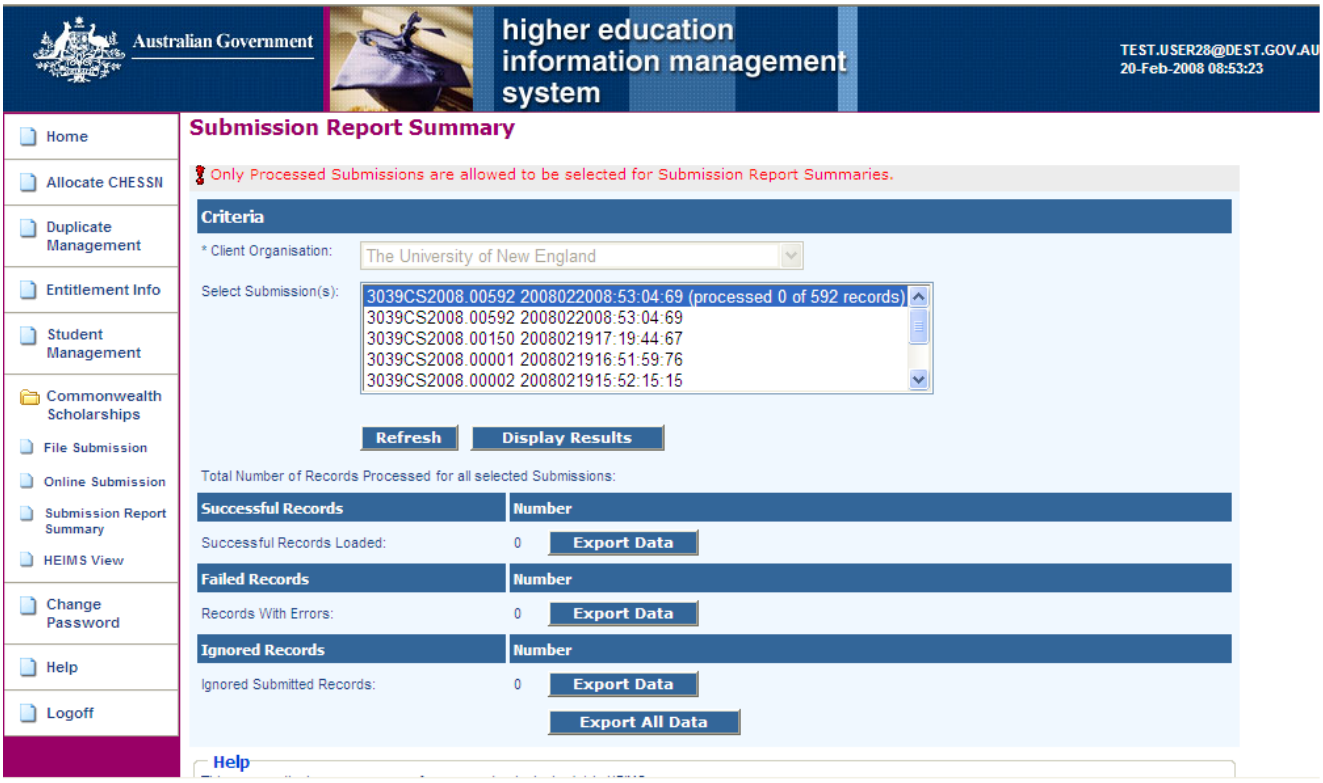


Fig 8

Where there is a current submission in progress, the system defaults that submission to the top of the submission window and the Successful Records Loaded, Records with Errors and Ignored Submitted Records will be set to zero for that submission and the Export buttons will be disabled.

Where the submitted file passes the file length and format checks, the system validates the data against the validation rules (mandatory fields and eligibility checks) and loads the records validated successfully. The system processes all records on the file and any records that are in error or that have been reported previously are marked and stored for later reporting.

Refresh Selected Submission(s) view

An update of the current submission processed (and in progress) can be viewed by selecting the Refresh button.

If the current submission has completed processing since the last refresh, all submission will be available for export in the Select Submission(s) window. Submissions are uniquely identified by their HEP file name concatenated with the submission date and submission time.

Display Results

The Display Results button shows the number of successful records, failed records and ignored records for all selected submissions (except for a submission in progress). To select multiple submissions, first use the <Ctrl> key to highlight the selected submissions.

For a submission in progress, the records processed will display as zero.

ENTERING A NEW CS OFFER OR A NEW CS RECORD

The steps to submitting a CS Offer or CS record are:

- Go to Commonwealth Scholarships menu *(refer to Fig 1)*
- Select Online Submission menu item (*refer to Fig 1*)
- Enter all mandatory field information (mandatory fields indicated by *)

- For CS Offers ensure that you place a '7 - Offered' in the 'Scholarship Status' field (refer to Fig 9) and that 'Scholarship type' is equal to 5,6 A and B (refer to Fig 10).
- Select the **Submit** button

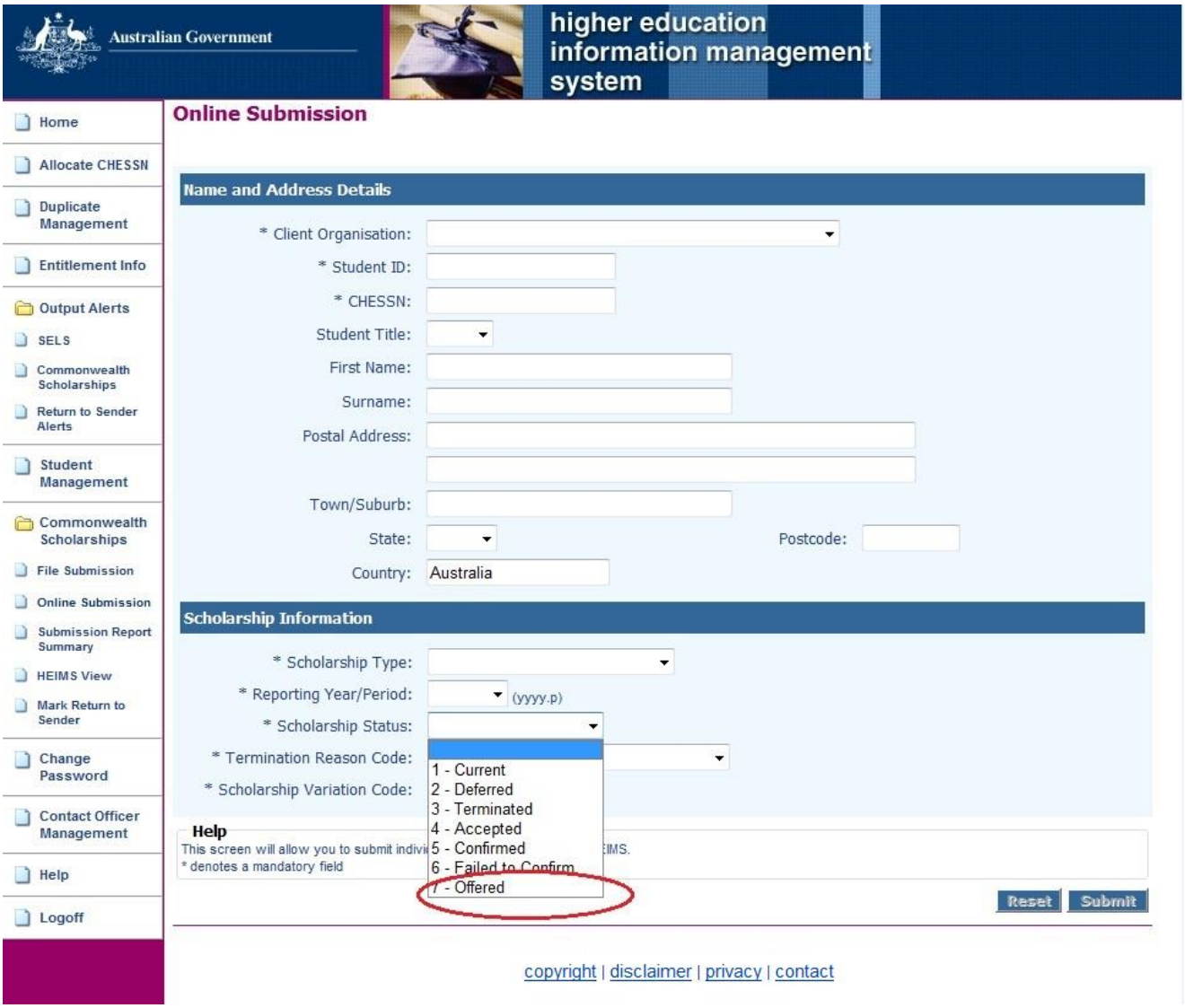


Fig 9

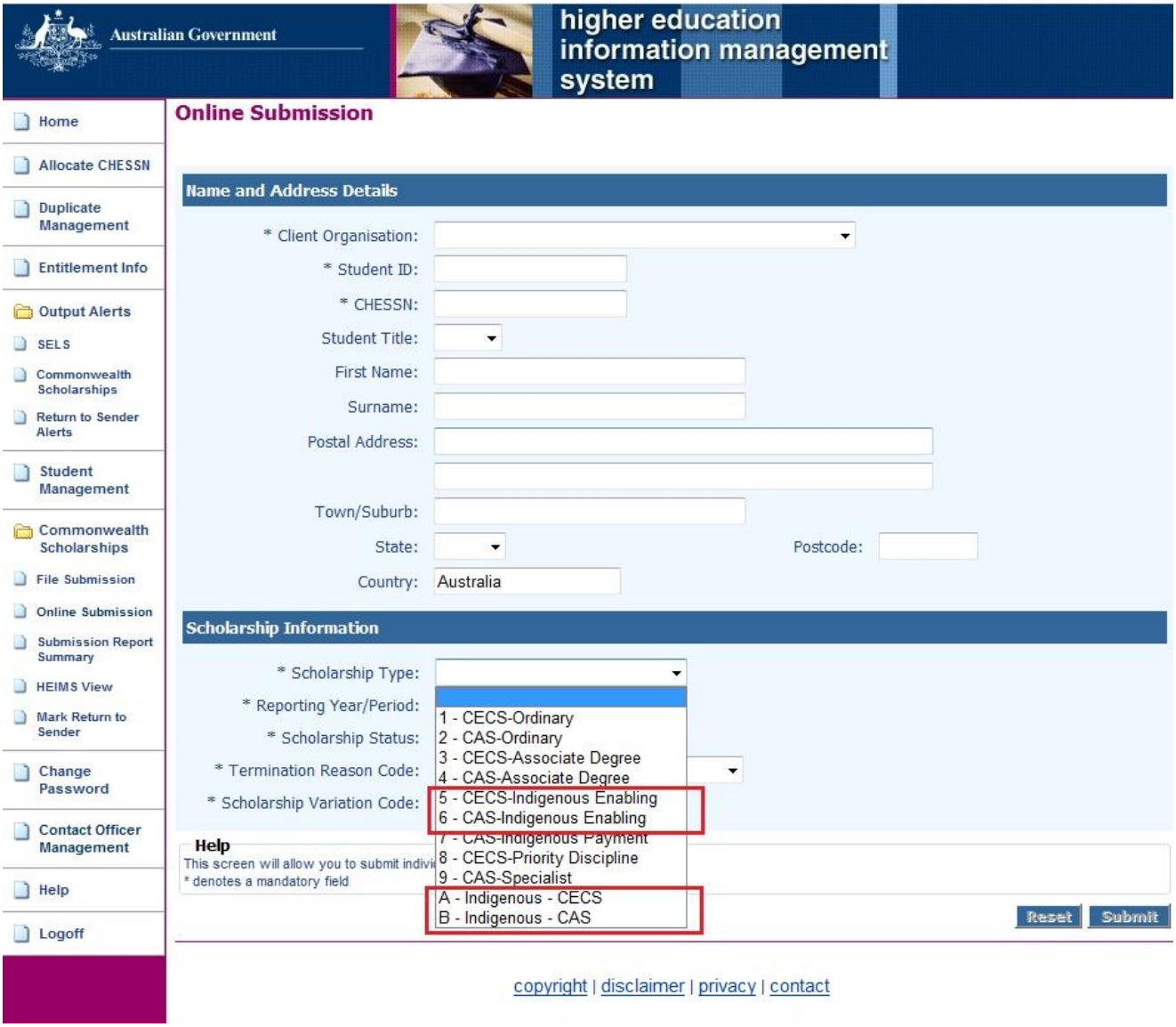

Australian Government
higher education information management system
Home
Allocate CHESSN
Duplicate Management
Entitlement Info
Output Alerts
SELS
Commonwealth Scholarships
Return to Sender Alerts
Student Management
Commonwealth Scholarships
File Submission
Online Submission
Submission Report Summary
HEIMS View
Mark Return to Sender
Change Password
Contact Officer Management
Help
Logoff
Online Submission
Name and Address Details
* Client Organisation:
* Student ID:
* CHESSN:
Student Title:
First Name:
Surname:
Postal Address:
Town/Suburb:
State:
Postcode:
Country:
Australia
Scholarship Information
* Scholarship Type:
* Reporting Year/Period:
* Scholarship Status:
* Termination Reason Code:
* Scholarship Variation Code:
1 - CECS-Ordinary
2 - CAS-Ordinary
3 - CECS-Associate Degree
4 - CAS-Associate Degree
5 - CECS-Indigenous Enabling
6 - CAS-Indigenous Enabling
8 - CECS-Priority Discipline
9 - CAS-Specialist
A - Indigenous - CECS
B - Indigenous - CAS
Help
* denotes a mandatory field
Reset
Submit
copyright | disclaimer | privacy | contact

Fig 10

Entering a single CS Offer or CS Record

The Commonwealth Scholarship Online Submission screen will allow users to submit a single scholarship offer or record.

If the User is a HEP user, the system will default the HEP's name into Client Organisation field.

For a department user, this filed will be blank.

The user must enter the mandatory fields required for the student and scholarship and where the student is commencing, their name and address details and Submit the record.

The submit process will validate all mandatory and required fields and report any errors back on the submission screen (*refer Fig 11).*

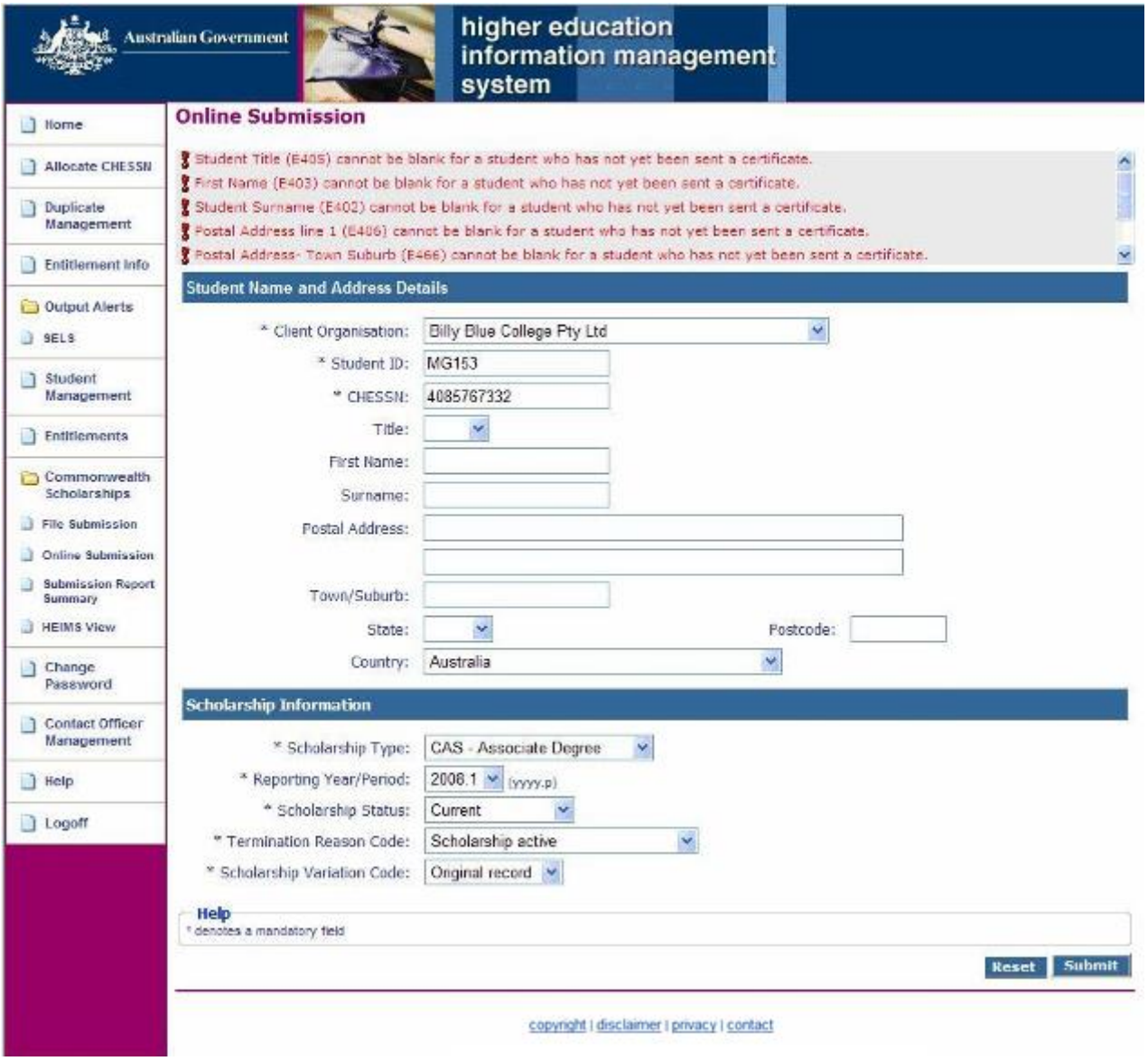


Fig 11

Once processing is completed successfully, the system will display a message on the Online Submission screen quoting the CHESSN number of the student record submitted as shown in *Fig 12.*

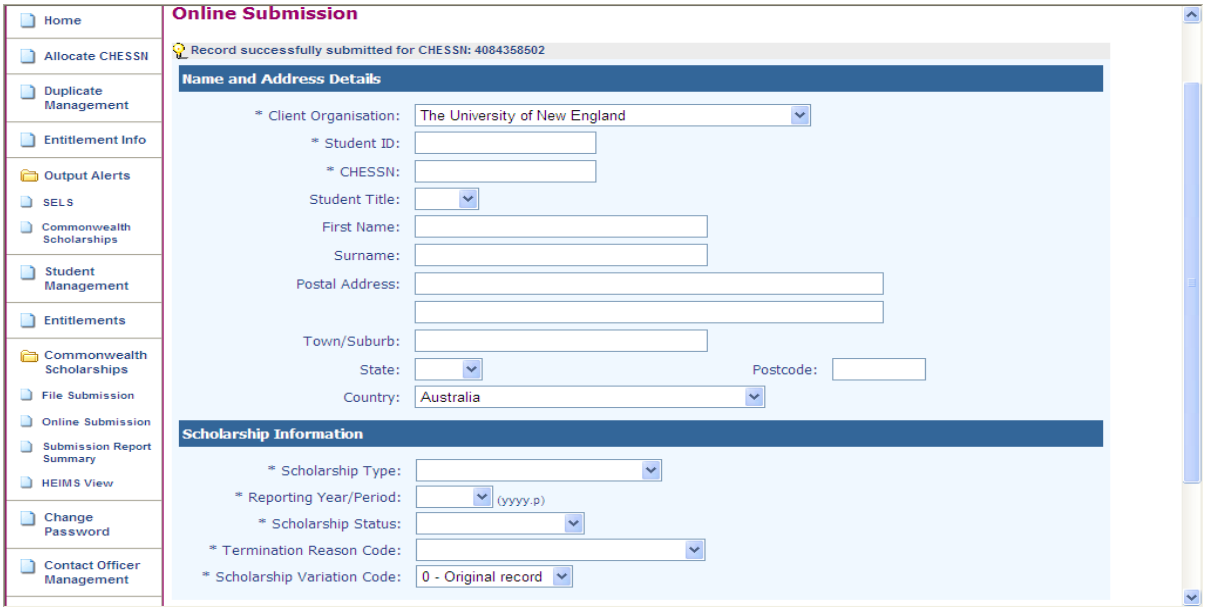


Fig 2

The Reset button will clear the screen contents of the Online Submission. The user has to first agree that any existing entered data can be cleared.

Records may also be modified or deleted using this screen. The record should first be located using the HEIMS View function. Once the record is selected in the HEIMS view, it will be displayed in the Online Submission where it can be modified or deleted (refer to Section 3.6.3 and 3.6.4 of this guide).

SUBMISSION REPORT SUMMARY (VIEWING AND EXPORTING SUBMITTED DATA)

The steps to view and export submitted data are:

- Go to Commonwealth Scholarships menu (Refer Fig 1)
- Select Submission Report Summary menu item (Refer Fig 1)
- Highlight a submission (s) from the Select Submission(s) window
- Select the Display Results button
- Export data using the Export Data or Export All Data buttons

Displaying a Loaded Submission

The Client Organisation drop down will default to the Client Organisation (HEP) of the user and the Select Submission(s) window will be populated with the submissions belonging to that Client Organisation. Where the user is a department user, the Client Organisation and the Select Submission(s) window will be blank until the user nominates a Client Organisation and the system populates the window with all submissions for that Organisation.

To display a submission summary, the user chooses a previously loaded submission displayed in the Select Submission (s) window and selects the Display Results button.

The system displays the number of Successful Records Loaded, Records with Errors and Ignored Submitted Records for the selected submission (refer Fig 13). Data for the individual record types can be exported from this report to an Excel spreadsheet using the Export Data button or all data can be exported using the Export All Data button.

Note that a submission Id of the form 3039CS 20080220 14:05:36:54 is one for a single CS record whereas an Id of the form 3039CS2008.00592 2008022010:34:06:97 is for a Flat File submission.

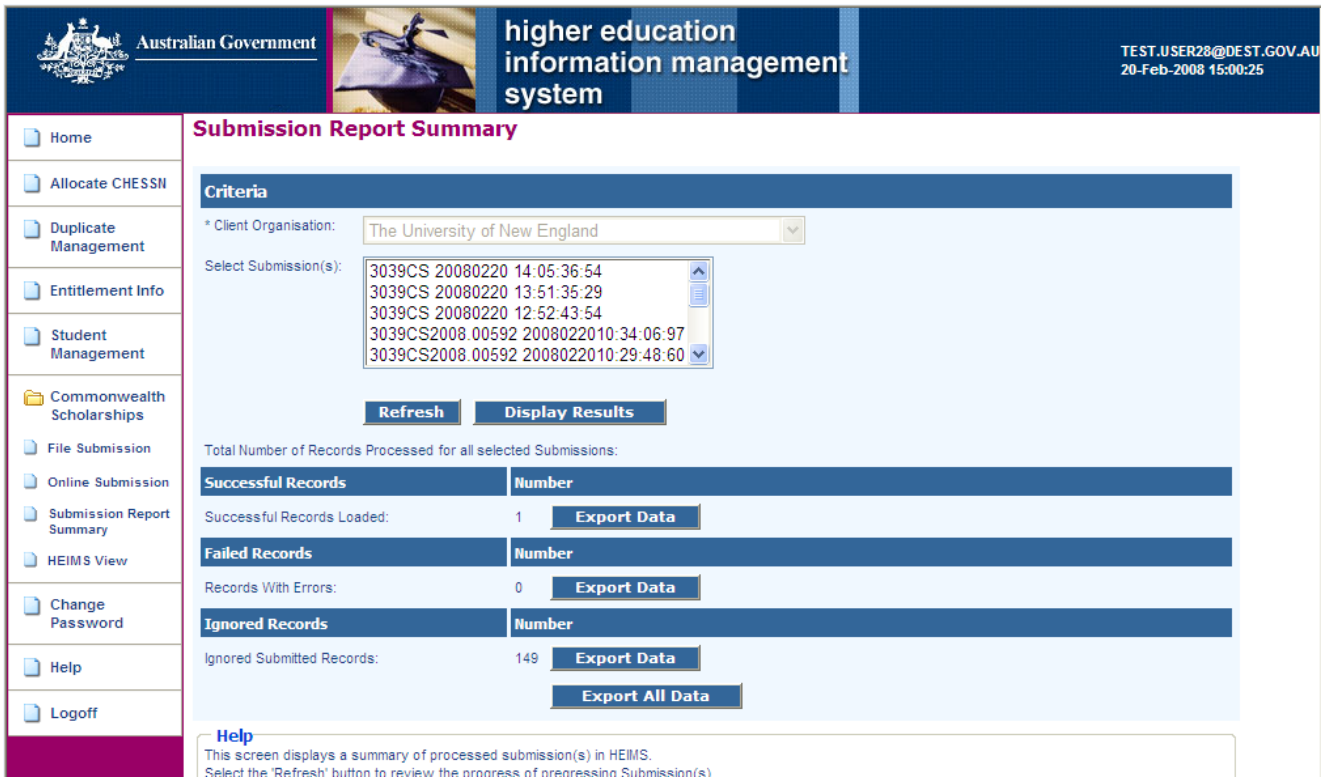


Fig 13

A user is able to select multiple submissions in the Select Submission(s) window by selecting a start submission and with the <Shift> key held, select an end submission. All submissions in the range highlighted will be available for export. Alternatively, multiple submissions may be individually selected by using the <Ctrl> Control key and selecting the required submissions to be exported.

Exporting Submission Data

Data for Successful Records loaded, Records with Errors or Ignored Submitted Records for the selected submission(s) may be exported to an Excel spreadsheet(s) using the individual Export Data buttons or all data can be exported using the Export All Data button.

Where the user chooses to export only one type of record, for example the successful records loaded, the system will create an Excel Workbook containing a Report Summary Tab and a Successful Records Tab. Where the Export All Data option is used, the Excel Workbook will contain only tabs for the relevant data. For example in displaying the Submission selected in *Fig 13*, it would contain a Report Summary Tab, a Successful Records Tab and a Failed Records Tab.

The export process provides the ability to immediately open the file or save it via a standard Windows interface as shown in *Fig 14*.

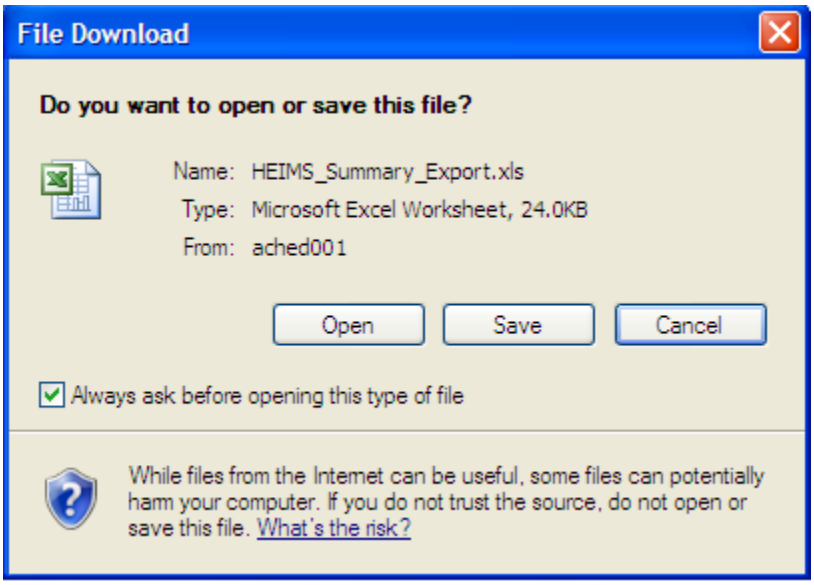


Fig 14

Exported Reports

As outlined in the previous section, data exported for Scholarships is loaded into an Excel Workbook. Each category of record exported is displayed in an individual tab of the workbook. CS records are listed by Submission Key with their individual data elements contained in the submission file.

Example reports are shown below:

Successful Records

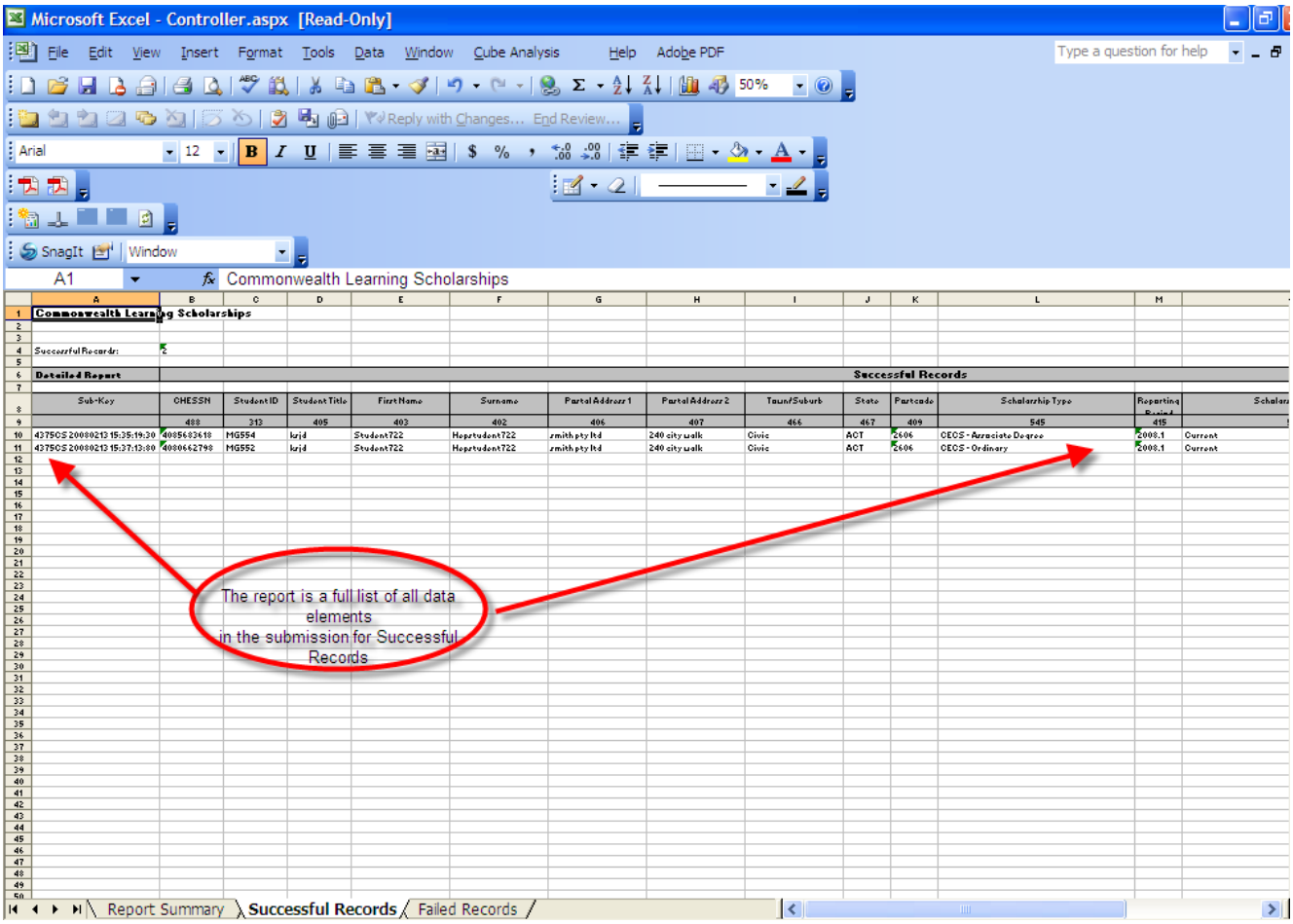


Fig 15

Failed Records (Records with Errors)

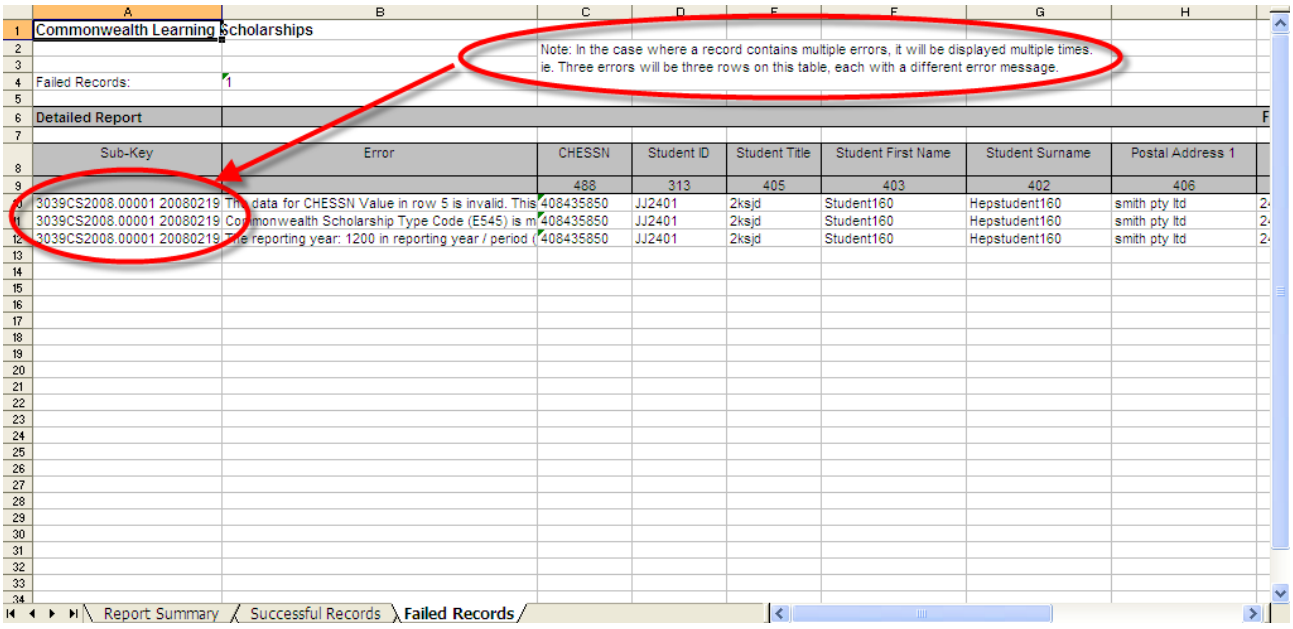


Fig 16

Note where a record has multiple errors, it will be displayed in the Failed Records Report multiple times; once for each type of error contained in the record as indicated in the note in the top section of the report.

The report also contains the row number of its location in the Flat File in its last column.

Report Summary

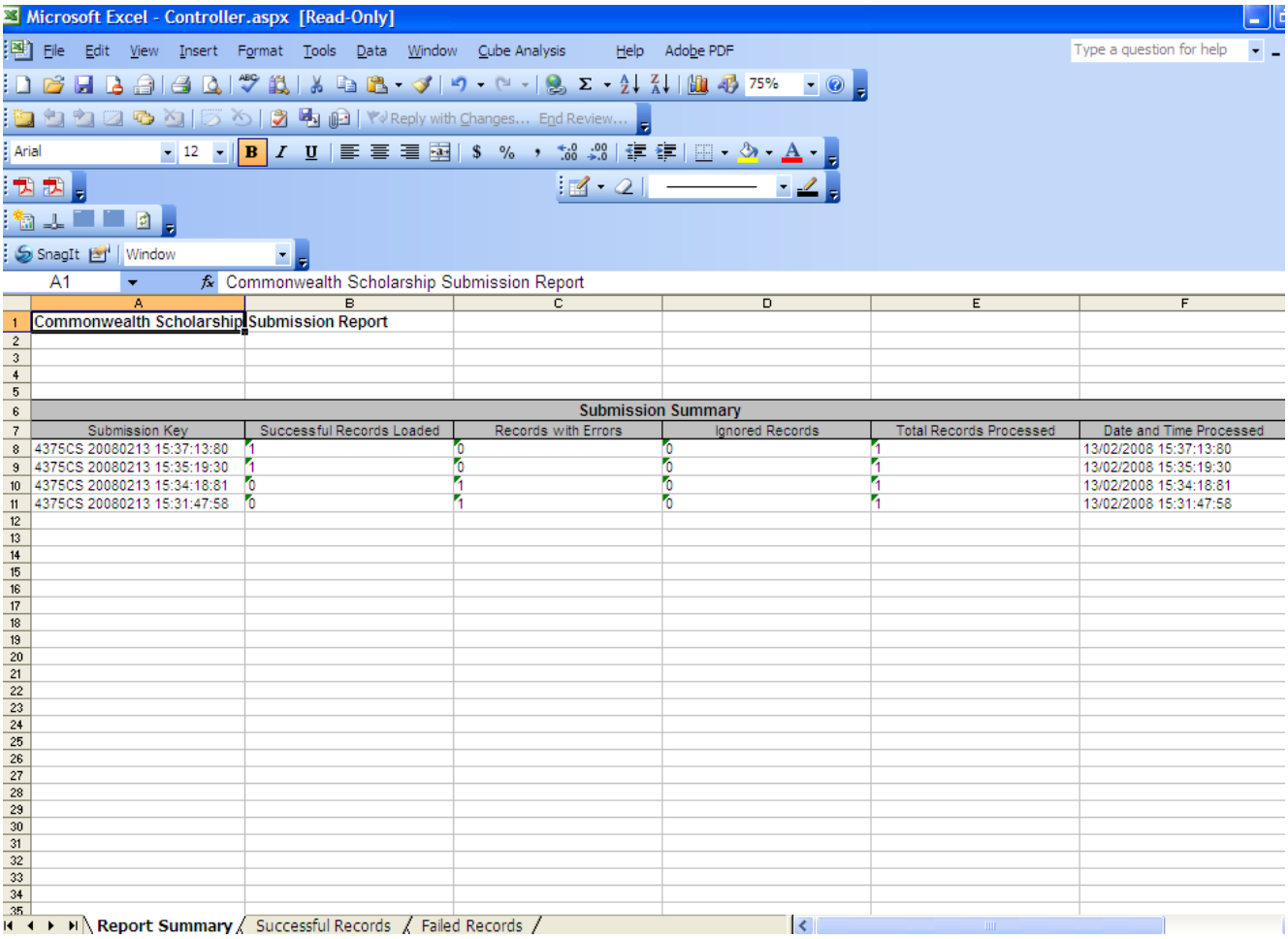


Fig 17

The Report Summary tab also contains a summary listing for each Submission Key containing the number and types of records exported and the date and time processed. The detail contained in this Tab relates back to the counts displayed in the Submission Report Summary screen and gives the total number of records processed.

Limits on Exported Data

Where the total records for all submissions selected to export is greater than 10,000, the system will warn the user and asks them if they wish to proceed with the export. Where the total records for all submissions selected to export is greater than 60,000, the system will advise the user of this fact and asks them if they wish to proceed. If the user chooses to proceed with the export, the system limits the export to the latest 60,000 submitted records (limiting the total number of records to 60,000 by dropping records from the oldest submission first).

Scholarship Data Elements

For a full list of the Scholarship data elements refer to the Appendix A – CS Flat File Structure.

HEIMS VIEW (VIEWING A STUDENT RECORD)

The steps to view student data from the HEIMS view are:

- Go to Commonwealth Scholarships menu
- Select HEIMS View menu option
- The system will default to the User's Client Organisation
- Select Search to return records for the Client Organisation OR
- Filter by various selection criteria (Student ID, Scholarship Type, Scholarship Status, CHESSN, Termination Reason, Reporting Year/Period)

Displaying Records

The HEIMS view provides a mechanism to review the student records that have been successfully loaded into the system (refer Fig 18). All records loaded for the Client Organisation can be displayed and further filtering of records is available based on specific attributes of the scholarship record, for example the data display may be further filtered by Reporting Year/Period and the system will limit the display to that criteria.

The Search button returns the records for the defined selection criteria.

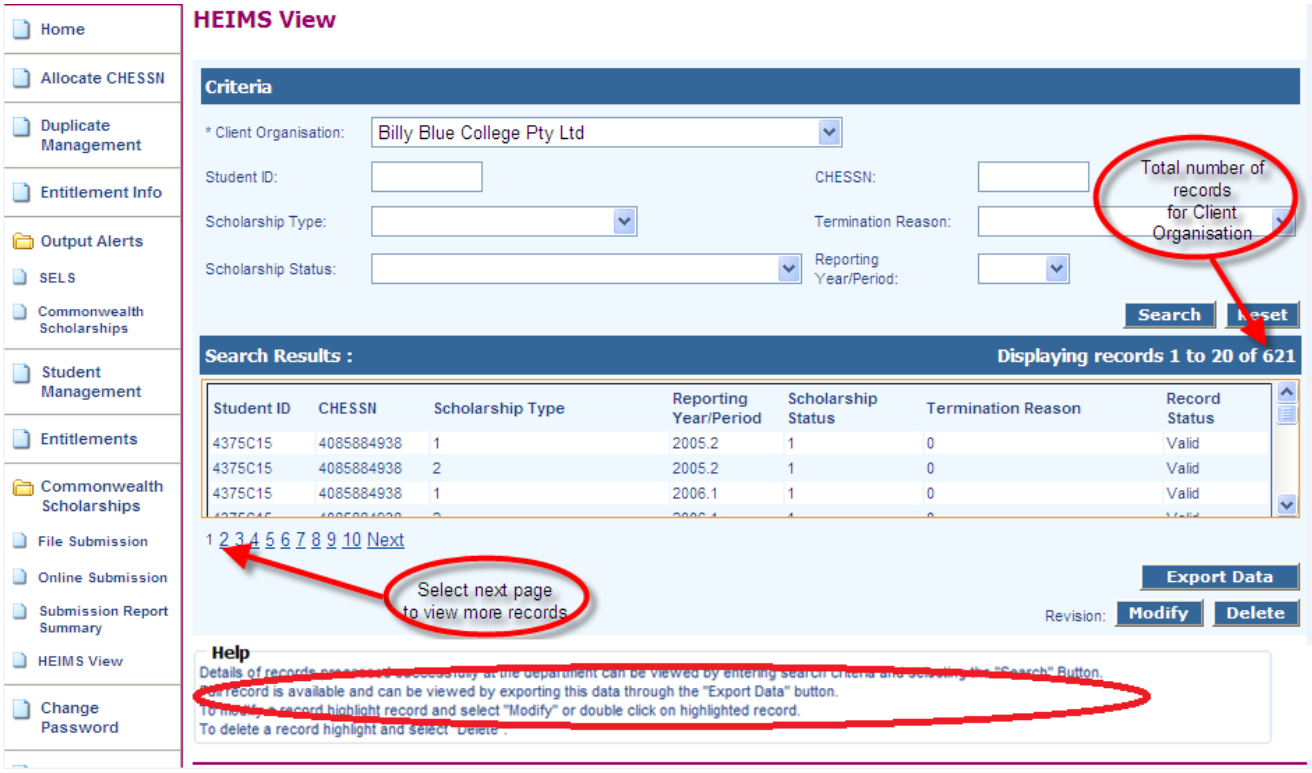


Fig 18

The *'Billy Blue College Pty Ltd'* has 621 records currently successfully loaded into the system. All these records may be viewed by progressively working through the page numbers displayed below the results window.

The 'Search Results' display contains the additional attribute 'Record status'. The possible statuses are:

Valid – any successfully loaded record.

Invalid – a record where there is insufficient entitlement to cover it.

Deleted – A record that has been deleted from the HEIMS database.

See example of all these record statuses displayed in *Fig 23*.

Exporting Data

Display required records as described in 2.6.1.

To export these records to Excel, select the Export Data button. All records will then be exported.

The export process provides the ability to immediately open the file or save it via a standard Windows interface as shown in *Fig 19*.

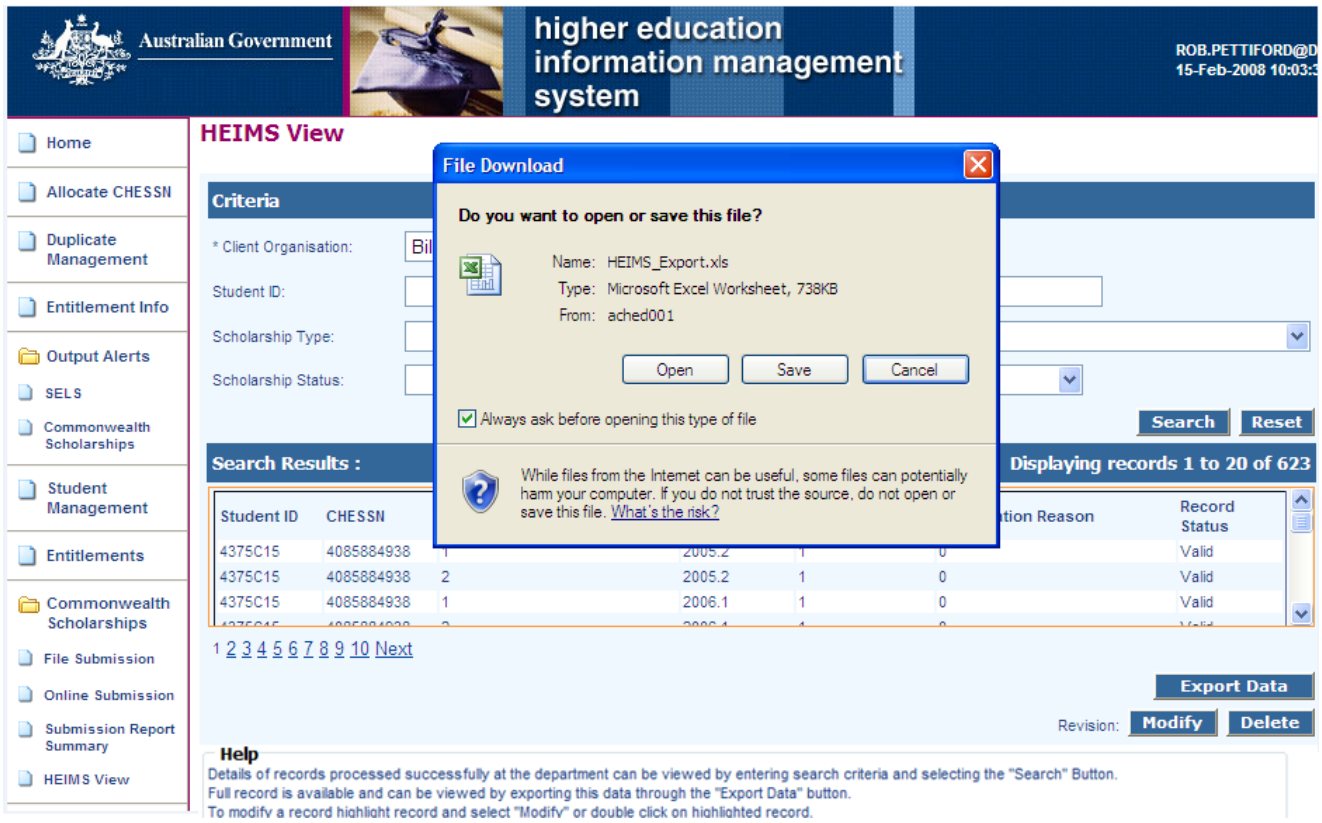
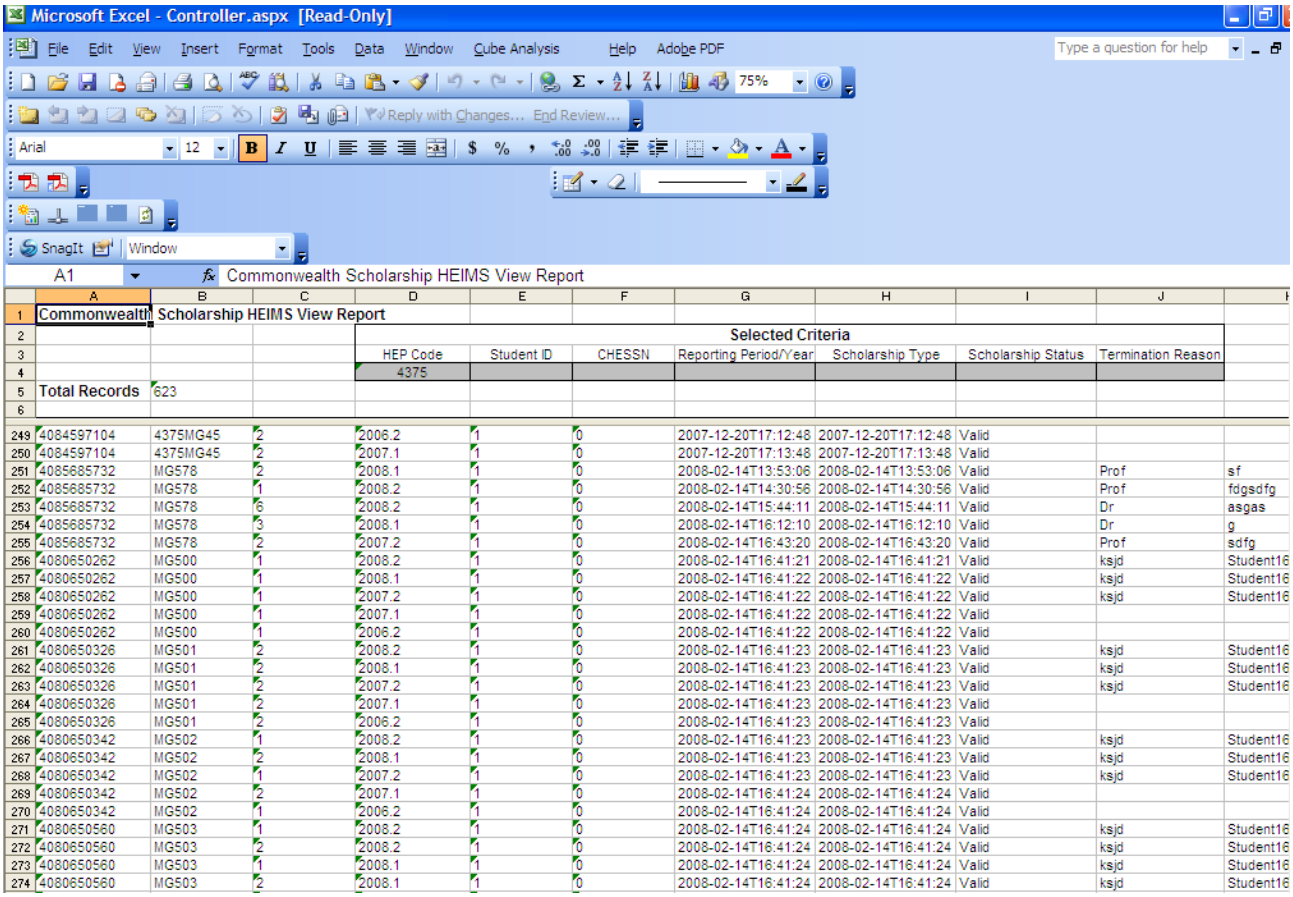


Fig 19

The format and content of the exported report is shown in *Fig 20.*



249	4084597104	4375MG45	2	2006.2	1	0	2007-12-20T17:12:48	2007-12-20T17:12:48	Valid		
250	4084597104	4375MG45	2	2007.1	1	0	2007-12-20T17:13:48	2007-12-20T17:13:48	Valid		
251	4085685732	MG578	2	2008.1	1	0	2008-02-14T13:53:06	2008-02-14T13:53:06	Valid	Prof	sf
252	4085685732	MG578	1	2008.2	1	0	2008-02-14T14:30:56	2008-02-14T14:30:56	Valid	Prof	fdgsdfg
253	4085685732	MG578	6	2008.2	1	0	2008-02-14T15:44:11	2008-02-14T15:44:11	Valid	Dr	asgas
254	4085685732	MG578	3	2008.1	1	0	2008-02-14T16:12:10	2008-02-14T16:12:10	Valid	Dr	g
255	4085685732	MG578	2	2007.2	1	0	2008-02-14T16:43:20	2008-02-14T16:43:20	Valid	Prof	sdfg
256	4080650262	MG500	1	2008.2	1	0	2008-02-14T16:41:21	2008-02-14T16:41:21	Valid	ksjd	Student16
257	4080650262	MG500	1	2008.1	1	0	2008-02-14T16:41:22	2008-02-14T16:41:22	Valid	ksjd	Student16
258	4080650262	MG500	1	2007.2	1	0	2008-02-14T16:41:22	2008-02-14T16:41:22	Valid	ksjd	Student16
259	4080650262	MG500	1	2007.1	1	0	2008-02-14T16:41:22	2008-02-14T16:41:22	Valid		
260	4080650262	MG500	1	2006.2	1	0	2008-02-14T16:41:22	2008-02-14T16:41:22	Valid		
261	4080650326	MG501	2	2008.2	1	0	2008-02-14T16:41:23	2008-02-14T16:41:23	Valid	ksjd	Student16
262	4080650326	MG501	2	2008.1	1	0	2008-02-14T16:41:23	2008-02-14T16:41:23	Valid	ksjd	Student16
263	4080650326	MG501	2	2007.2	1	0	2008-02-14T16:41:23	2008-02-14T16:41:23	Valid	ksjd	Student16
264	4080650326	MG501	2	2007.1	1	0	2008-02-14T16:41:23	2008-02-14T16:41:23	Valid		
265	4080650326	MG501	2	2006.2	1	0	2008-02-14T16:41:23	2008-02-14T16:41:23	Valid		
266	4080650342	MG502	1	2008.2	1	0	2008-02-14T16:41:23	2008-02-14T16:41:23	Valid	ksjd	Student16
267	4080650342	MG502	2	2008.1	1	0	2008-02-14T16:41:23	2008-02-14T16:41:23	Valid	ksjd	Student16
268	4080650342	MG502	1	2007.2	1	0	2008-02-14T16:41:23	2008-02-14T16:41:23	Valid	ksjd	Student16
269	4080650342	MG502	2	2007.1	1	0	2008-02-14T16:41:24	2008-02-14T16:41:24	Valid		
270	4080650342	MG502	1	2006.2	1	0	2008-02-14T16:41:24	2008-02-14T16:41:24	Valid		
271	4080650560	MG503	1	2008.2	1	0	2008-02-14T16:41:24	2008-02-14T16:41:24	Valid	ksjd	Student16
272	4080650560	MG503	2	2008.2	1	0	2008-02-14T16:41:24	2008-02-14T16:41:24	Valid	ksjd	Student16
273	4080650560	MG503	1	2008.1	1	0	2008-02-14T16:41:24	2008-02-14T16:41:24	Valid	ksjd	Student16
274	4080650560	MG503	2	2008.1	1	0	2008-02-14T16:41:24	2008-02-14T16:41:24	Valid	ksjd	Student16

Fig 20

The Reset button clears the non mandatory selection criteria. The system will require the user to agree to disregard the current displayed data as shown in *Fig 21*.

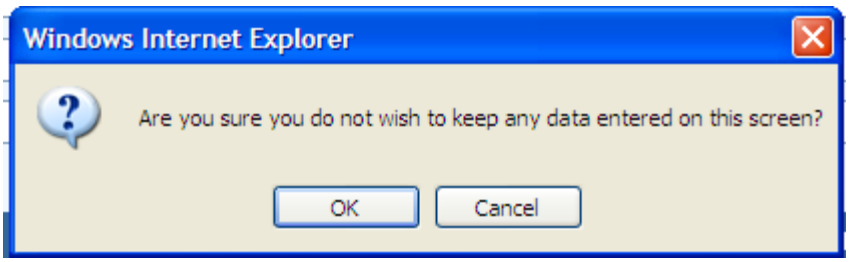


Fig 21

Modifying a CS Record

A record can be modified from the HEIMS View as follows:

- Select the record in the HEIMS View and select to Modify.
- In the Online Submission screen review the record and select Submit.

Select the target record by 'double clicking' on it; the system will open the target record in the Online Submission screen with Scholarship Variation Code defaulted to 'Modified Record'.

Alternatively, by highlighting the target record and selecting the Modify button the same result will be achieved. To complete the process submit the record on the Online Submission screen.

The user has the ability to change the Scholarship Variation Code at this point in the Online Submission screen. If they reset this code to 'Original record' and submit, the system will return an error as the record already exists. However, it is possible to change Scholarship Variation Code from 'Modify' to 'Delete' prior to the record being submitted in the Online Submission screen.

How do I modify a CS Offer

When an Offer has been accepted by a student you will need to modify the original CS Offer record to a current record by taking the following steps outlined below.

Modifying a CS Offer Record to a current record

- Go to Commonwealth Scholarships menu
- Select HEIMS View menu option
- The system will default to the User's Client Organisation
- Select Search to return records for the Client Organisation OR
- Filter by various selection criteria (Student ID, Scholarship Type, Scholarship Status, CHESSN, Termination Reason, Reporting Year/Period)
- Select the CS Offer record in the HEIMS View and select to Modify
- In the Online Submission screen change the 'Scholarship Status' field from '7 – Offered' to '1 - Current
- Select the record in the HEIMS View and select to Modify.
- In the Online Submission screen review the record and select Submit.
- The submit process will validate all mandatory and required fields and report any errors back on the submission screen.

3.1.5 How do I delete a CS Offer or CS Record

If you report a CS Offer or Record in error please follow the steps outlined below to delete the record.

Deleting a CS Offer or CS Record

- Select the CS Offer or CS Record in the HEIMS View and select to Delete.
- In the Online Submission screen review the record and select Submit.

A record may be deleted by highlighting the target record and selecting the Delete button. The system will open the target record in the Online Submission screen with Scholarship Variation Code defaulted to 'Delete Record'. To complete the process submit the record on the Online Submission screen.

Once the process of deleting a record is complete, the system displays the Submission Report Summary screen. The submission for the deleted record will be at the top of the submission window list and display as a Successful Record Loaded.

The HEIMS View will display the record with a Record Status of 'Deleted' as shown in *Fig 22.*

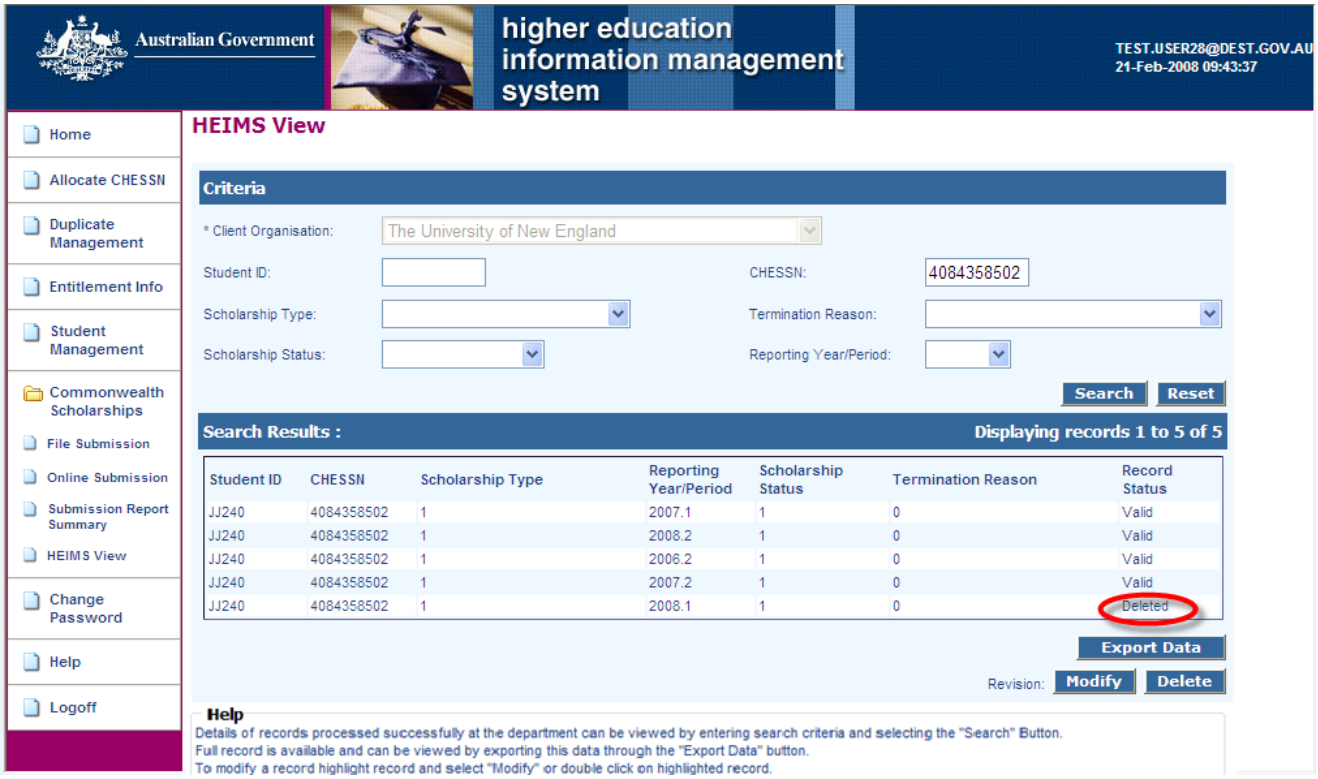


Fig22

A previously deleted record cannot be reselected for modification and the system will return an error as shown in Fig 23.

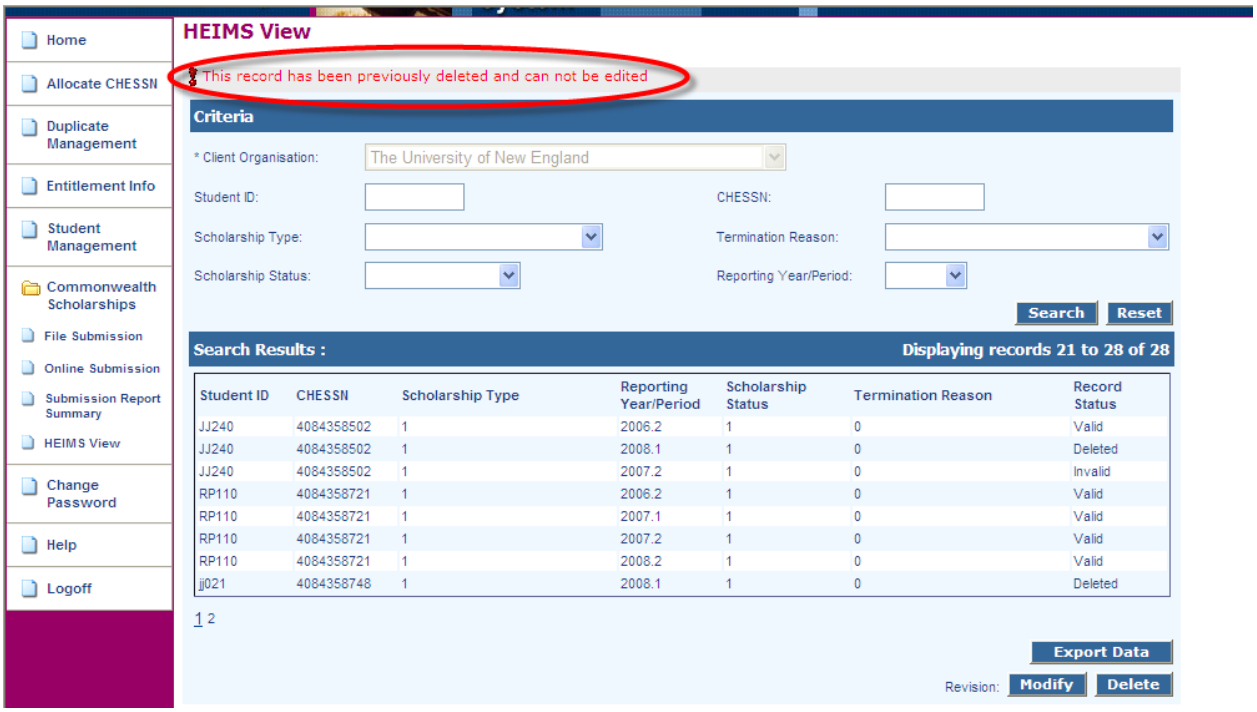


Fig 23

Data Element Attributes

Element Type	Element name	Element number	Data type	Updatable	Length	Mandatory for all records	Mandatory for Commencing Scholarship records
Personal Identifier	Student identification code	313	Alphanumeric	No	10	Yes	Yes
	CHESSN	488	Alphanumeric	Yes	10	Yes	Yes
	Student Title	405	Character	Yes	15	No	Yes
	First Name	403	Character	Yes	15	No	Yes
	Student Surname	402	Character	Yes	30	No	Yes
	Postal Address line 1	406	Character	Yes	38	No	Yes
	Postal Address line 2	407	Character	Yes	38	No	Yes
	Postal Address – Scholarship Postcode	568	Alphanumeric	Yes	10	No	Yes
	Postal Address Town/Suburb	466	Character	Yes	27	No	Yes
	Postal Address – State code	467	Character	Yes	3	No	No
	Postal Address - Country name	468	Character	Yes	20	No	No
Programme Management	Commonwealth Scholarship type code	545	Numeric	No	1	Yes	Yes
	Reporting Year / Period	415	Numeric	No	5	Yes	Yes
	Commonwealth Scholarship status code	526	Numeric	No	1	Yes	Yes
	Commonwealth Scholarship termination reason code	538	Numeric	Yes	1	Yes	Yes
	Scholarship Variation code	567	Numeric	Yes	1	Yes	Yes
	Filler (any printable ASCII characters including spaces)	N.A.	Alphanumeric	N.A	149	No	No